



CEDEFOP

European Centre for the Development
of Vocational Training

Thessaloniki, 14/09/1010
RS/PRO/DELE/2010/612

OPEN INVITATION TO TENDER

AO/ECVL/SPEV/AssessingLearningOutcomes/018/10

“Assessing learning outcomes in VET”

Contract notice: 2010/S 178-270856 of 14/09/2010

Dear Sir/Madam,

We thank you for the interest you have shown in this tender.

The purpose of this tender and additional information necessary to present a tender can be found in the attached Tender Specifications. You should note however the following important points concerning the submission of a tender and its implications.

1. Tenders should be submitted preferably in English, but in any case in one (or in any) of the official languages of the European Union.
2. Tenders may be submitted exclusively in one of the following ways:

(a) by post to be dispatched not later than **the date and time specified in the timetable in point 8 below**, in which case the evidence shall be constituted by the date of dispatch on the postmark or the date of the deposit slip, to the following post address of Cedefop :

**European Centre for the Development of Vocational Training (Cedefop),
Procurement Service
Attention of Mr G. Paraskevaidis
PO Box 22 427
GR – 55102 Thessaloniki, Greece**

Important:

Tenderers shall inform Cedefop by e-mail (c4t-services@cedefop.europa.eu) or fax (+30 2310 490028)

- ✓ *that they have submitted an offer in time, and*
 - ✓ *that they request Cedefop to confirm receipt of the e-mail or fax.*
- Do not attach* your offer to any of the above information e-mail or fax.

OR

(b1) by courier service to be dispatched not later than **the date and time specified in the timetable in point 8 below**, in which case the evidence shall be constituted by the date of dispatch to the address below or the date of the deposit slip,

OR

(b2) delivered by hand not later than **the date and time specified in the timetable in point 8 below**, in which case a receipt must be obtained as proof of submission, signed and dated by the official in the above mentioned Service who took delivery,

to the following address (for points **(b1)** and **(b2)**):

**European Centre for the Development of Vocational Training (Cedefop),
Procurement Service
Attention of Mr G. Paraskevaidis
123, Europe Str, GR-57001 Thessaloniki-Pylea,
PO Box 22 427 - Greece
Tel: +30 2310 490111 / 490 064**

Please note that Cedefop is open from 09h00 to 17h00, Monday to Friday. It is closed on Saturday, Sunday and Cedefop holidays.

3. Tenders must be submitted strictly adhering to the following.

Tenders must be submitted in a sealed envelope itself enclosed within a second sealed envelope. If self-adhesive envelopes are used, they must be sealed with adhesive tape and the sender must sign across this tape.

The **outer envelope**, addressed simply to Cedefop (address depending on the means of submission, see point 2 above), should only bear additionally **the name and address** of the sender.

The **inner envelope**, addressed to the Procurement Service as indicated under point 2 above, must bear a self-adhesive label with the indication **“Open Invitation to tender – Not to be opened by the internal mail service”** and all the necessary information, as shown below:

OPEN INVITATION TO TENDER CEDEFOP No: AO/ECVL/SPEV/AssessingLearningOutcomes/018/10 <i>“Assessing learning outcomes in VET”</i> Name of tenderer: NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE

The inner envelope must also contain three sealed envelopes, namely, **Envelope A – “Supporting Documents”**, **Envelope B – “Technical Proposal”** and **Envelope C – “Financial Proposal”**. The content of each of these three envelopes is described in point 6 of the attached tender specifications.

4. Tenderers must ensure that their tenders are signed by an authorised representative and that tenders are legible. It is mandatory to include in the offer a cover letter, signed by the person/s that is/are authorised to sign the contract in case of contract award. The absence of a signed cover letter may lead to rejection of the offer.
5. Submission of a tender implies acceptance of all the terms and conditions set out in this invitation to tender, in the specifications and in the draft contract and, where appropriate, waiver of the tenderer’s own general or specific terms and conditions. It is binding on the tenderer to whom the contract is awarded for the duration of the contract.
6. The opening of tenders will take place at Cedefop on **the date and time as specified in the timetable in point 8 below**. Each tenderer may be represented at the opening of tenders by one person. The name of the person attending the opening must be notified in writing by fax (Fax No +30 2310 490 028) or by e-mail (C4T-services@cedefop.europa.eu) at least two working days prior to the opening session.
7. Contacts between the contracting authority (Cedefop) and tenderers are prohibited throughout the procedure save in exceptional circumstances and under the following conditions only:

Before the final date for submission of tenders:

- At the request of the tenderer, the Cedefop Procurement Service may provide additional information solely for the purpose of clarifying the tender documents. Any request for additional information must be made in writing by fax (fax No +30 2310 490 028) or by e-mail (C4T-services@cedefop.europa.eu).

Requests for additional information/clarification should be received by the date and time as specified in the timetable in point 8 below. No such requests will be processed after that date.

- The contracting authority may, on its own initiative, inform interested parties of any error, inaccuracy, omission or any other clerical error in the text of the call for tender.

Any additional information, including that referred to above, will be published on Cedefop's website. Please ensure that you visit regularly the site for updates up to the closing date for receipt of tenders.

After the opening of tenders:

- If clarification is required or if obvious clerical errors in the tender need to be corrected, the contracting authority may contact the tenderer provided the terms of the tender are not modified as a result.
- Tenderers should not contact the contracting authority (i.e. Cedefop) on their own initiative after the tenders have been opened.
- The non-submission with the offer of the mandatory documents required in the Tender Specifications below in regards to the Exclusion and Selection Criteria, will lead to rejection of the respective tender without requesting any clarification. Clarifications during the first phase (exclusion and selection criteria) may be asked only for presented documents.
- If the supporting documents for the assessment of an award criterion are missing, these may not be requested as clarification either, because this would alter the proposal. Any requests for clarification in that regard should not lead to amendment of the terms of the tender. The tenderers' replies must serve solely the purpose to provide the Evaluation Committee with a clarification regarding the offer in relation to the technical proposal or concerning obvious clerical errors in the financial offer. Neither the technical content of the tender nor the financial offer may be changed.
- In case the tenderer alters the total financial offer during a clarification (beyond the correction of any obvious clerical/calculation errors), this offer will be automatically rejected.

8. Timetable:

	DATE	TIME
Deadline for request for any clarifications from the Contracting Authority	15/10/2010	< N/A >
Deadline for submission of tenders (hand delivered)	25/10/2010	< 17h00 >
Deadline for submission of tenders by post / courier	25/10/2010	< N/A >
Tender opening session	08/11/2010	11h00

9. All costs incurred in preparing and submitting tenders are borne by the tenderers.
10. Up to the point of signature, the contracting authority may either abandon the procurement or cancel the award procedure, without the candidates or tenderers being entitled to claim any compensation. If such decision is taken, the tenderers will be notified accordingly.
11. This invitation to tender is in no way binding on Cedefop. Cedefop's contractual obligation commences only upon signature of the contract with the successful tenderer.
12. Tenderers are informed that for the purposes of safeguarding the financial interests of the European Union, their personal data may be transferred to internal audit services, to the European Court of Auditors, to the Financial Irregularities Panel and/or to the European Anti-Fraud Office (OLAF).

Data of economic operators which are in one of the situations referred to in Articles 93, 94, 96(1)(b) and 96(2)(a) of the Financial Regulation may be included in a central database and communicated to the designated persons of the Commission, other institutions, agencies, authorities and bodies mentioned in Article 95(1) and (2) of the Financial Regulation.

This refers as well to the persons with powers of representation, decision making or control over the said economic operators. Any party entered into the database has the right to be informed of the data concerning it, upon request to Cedefop's Head of Finance and Procurement.

13. Evaluating your tender and your possible subsequent replies to questions in accordance with the specifications of the invitation to tender, will involve the recording and processing of personal data (such as your name, address and CV). Such personal data will be processed by Cedefop's Finance and Procurement Service solely for that purpose and pursuant to Regulation (EC) No 45/2001 on the protection of individuals with regard to the processing of data by the Union institutions and bodies and on the free movement of such data. You are entitled to obtain access to your personal data on request and to rectify any such data that is inaccurate or incomplete. If you have any queries concerning the processing of your personal data, you may address them to the Head of Finance and Procurement. You have the right of recourse at any time to the European Data Protection Supervisor for matters relating to the processing of your personal data.
14. All tenderers will be informed in writing of the results of the tender procedure.

Yours sincerely,

G. Paraskevaidis
Head of Finance and Procurement

Attached: Tender Specifications

OPEN INVITATION TO TENDER

AO/ECVL/SPEV/AssessingLearningOutcomes/018/10

“Assessing learning outcomes in VET”

Tendering Specifications

Table of contents

Introduction to Cedefop	7
1 Overview of this tender	8
1.1 Description and type of the contract	8
1.2 Place of delivery or performance	8
1.3 Division into lots.....	8
1.4 Variants	8
1.5 Value or quantity of purchase	8
1.6 Validity of tenders	8
1.7 Duration of the contract	8
1.8 Main terms of financing and payment	8
2 Technical specifications.....	9
2.1 Introduction.....	9
2.2 General purpose of the study contract	13
2.3. Main research issues	13
2.4 Description of the tasks and methodology	14
2.5 Deliverables and timetable (outcome)	15
2.7 Reimbursement of travel expenses	16
3 Specific information concerning participation to this tender.....	17
3.1 Exclusion criteria	17
3.2 Selection criteria	17
3.3 Legal Position	19
4 Additional information concerning participation to this tender.....	20
4.1 Joint Offers/ Groupings (Consortia)	20
4.2 Subcontracting/Subcontractors	21
5 Award of the contract.....	22
5.1 Technical evaluation	22
5.2 Technical proposal	22
5.3 Financial evaluation	23
5.4 Financial proposal.....	23
6 Information on presentation and content of tender	25
6.1 Envelope A - Supporting documents	25
6.2 Envelope B – Technical proposal	25
6.3 Envelope C – Financial proposal	25

ANNEXES:

Annex A:	Contract Notice
Annex B:	Draft contract
Annex C:	Declaration on exclusion criteria
Annex D:	Legal entity form
Annex E:	Financial Identification Form
Annex F:	Check list of mandatory documents
Annex G:	Power of Attorney (Models 1 and 2)
Annex H:	Model of Letter of Intent for Subcontractor/s
Annex I:	Cedefop's Style Manual

Introduction to Cedefop

- 1) Founded in 1975 (1) and based in Greece since 1995, the European Centre for the Development of Vocational Training (Cedefop) is an agency of the European Union (EU) supporting European vocational education and training (VET) policy development. Its strategic objective for 2009-11 (2) is to ‘contribute to excellence in VET and strengthen European cooperation in developing, implementing and evaluating European VET policy’.
- 2) This strategic objective is supported by four priorities, namely:
 - (a) informing European VET policies;
 - (b) interpreting European trends in and challenges for skills, competences and learning;
 - (c) assessing VET’s benefits;
 - (d) raising the profile of VET.
- 3) Cedefop supports the European Commission, Member States (as well as the associated countries of Iceland and Norway) and social partners by:
 - (a) using its expertise, gathered through research, analysis and networking, to identify trends and challenges and propose ideas for VET policies;
 - (b) bringing together policy-makers, social partners, researchers and practitioners to share ideas and debate proposals on the best ways to tackle the challenges we face;
 - (c) encouraging European approaches, principles and tools to improve training and achieve common aims;
 - (d) raising awareness and understanding of how vocational education and training is evolving, and how it contributes to lifelong learning and other policies;
 - (e) disseminating information through websites, publications, networks, study visits, conferences and seminars.

Cedefop carries out its role through the tasks set out in its founding regulation. It disseminates information through its website, publications, networks, study visits, conferences and seminars.

- 4) Cedefop’s web portal www.cedefop.europa.eu includes news on training developments, information on vocational education and training systems in Europe, statistics and indicators, collaborative workspaces and a bibliographical database as well as information about Cedefop.
- 5) Information about Cedefop’s publications, many of which can be downloaded, can be found at the Cedefop bookshop at http://www.trainingvillage.gr/etv/Information_resources/Bookshop/list.asp. Cedefop’s wide range of books covers themes such as vocational education and training policy, research, future skill needs, learning outcomes, European qualifications framework and the validation of informal and non-formal learning.

(¹) Council Regulation of 10 February 1975 establishing a European Centre for the Development of Vocational Training (Cedefop) EEC No 337/75, *Official Journal of the European Communities* L39, 13.2.1975 as last amended by Council Regulation EC No. 2051/2004.

(²) Cedefop, *Enhancing European cooperation in vocational education through evidence and expertise: continuity, focus and flexibility: Cedefop’s medium-term priorities 2009-11*.

1 Overview of this tender

1.1 Description and type of the contract

a) The aim of this invitation to tender is to commission a study, which will map and comparatively analyse the implications of learning outcomes approaches on assessment methodologies in initial vocational education and training.

The study will provide an overview and comparative analysis of assessment methodologies in initial vocational education and training in the 32 countries participating in the Education and Training 2020 strategic Framework ("ET 2020"), as well as an in-depth analysis of 10 case studies. The study will elaborate a set of conclusions to inform European and national policy and research.

b) Service contract

1.2 Place of delivery or performance

The tasks must be completed at the Contractor's premises.

1.3 Division into lots

This invitation to tender is not divided into lots.

1.4 Variants

Tenderers **may not** offer variant solutions to what is requested in the technical specifications.

1.5 Value or quantity of purchase

Estimated budget available for this activity is **180 000 EUR**.

1.6 Validity of tenders

Tenderers must maintain the validity of their tender for at least 6 months following the deadline of submission of tenders, i.e. until **25/04/2011**.

1.7 Duration of the contract

The contract shall enter into force on the date of signature of the last contracting party, and shall be valid for a period of **18 months**.

1.8 Main terms of financing and payment

Payments will be made **within 30 days** of submission of invoices and at the conditions set out in the draft contract.

2 Technical specifications

2.1 Introduction

The purpose of this study is to map and analyse assessment methodologies and practises in 32 countries participating in the Education and Training 2020 strategic framework for European cooperation (“ET 2020”)³ and to examine up to what extent and how learning outcomes approaches influence assessment methodologies and practises in initial vocational education and training. The study aims to contribute to our understanding of how different methodologies used to assess learning outcomes may strengthen the relationship between education/training and the labour market.

The study is linked to the implementation of the Recommendation of the European Parliament and the Council on the European Qualifications Framework for lifelong learning (EQF)⁴ and the corresponding national qualifications frameworks (NQFs), the Recommendation on key competences⁵, the Recommendation on the European Credit system for Vocational Education and training (ECVET)⁶ and the Recommendation on the European Quality Assurance Reference Framework for Vocational Education and Training (EQAVET).⁷ It is broadly embedded in the implementation of the recent Communication from the Commission “A new impetus for European cooperation in Vocational Education and Training to support the Europe 2020 strategy”⁸. The Commission Communication Europe 2020 Strategy⁹ puts strong emphasis on education and training for smart and inclusive growth “to unleash Europe’s innovative capabilities, improving educational outcomes and the quality and outputs of educational institutions”. Three flagship initiatives notably “Innovation Union”, “Youth on the move” and “An Agenda for the new skills and jobs” call for coherent policies to invest in people and improve their employability skills and “to ensure that the competences required to engage in further learning and the labour market are acquired and recognised through general, vocational, higher and adult education and to develop a common language and operational tool for education/training and work: a European taxonomy of skills, competences and occupations (ESCO). Adequate assessment and recognition systems play a key role in supporting this objective.

The European Qualifications Framework for Lifelong Learning (2008) has been developed to support voluntary comparison and translation of qualifications in Europe. Based on eight levels of learning outcomes its objective is to facilitate communication between national systems, to improve transparency and comparability of qualifications across Europe’s diverse education and training systems. Increased transparency, international comparability and the need for common language are seen as prerequisites for EQF success. Cedefop’s evidence¹⁰ shows that Member States consider the development of national qualifications frameworks (NQFs), based on explicit learning outcome-based qualifications levels and the development of qualifications standards the most appropriate way to address EQF aims and objectives. In developing NQFs and referencing national qualifications levels to the EQF, quality assured certification processes¹¹ are of crucial importance to establish mutual trust between national systems. Valid and reliable assessment of learning outcomes is a critical element in the certification process.

³ 2009/C 119/02 <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2009:119:0002:0010:EN:PDF>

⁴ 2008/C 111/01 <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2008:111:0001:0007:EN:PDF>

⁵ 2006/962/EC <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2006:394:0010:0018:en:PDF>

⁶ 2009/C155/11 <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2009:155:0011:0018:EN:PDF>

⁷ 2009/C155/1 <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2009:155:0001:0010:EN:PDF>

⁸ COM(2010) <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:0296:FIN:EN:PDF>

⁹ COM(2010) 2020 <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:2020:FIN:EN:PDF>

¹⁰ Cedefop. 2010: Development of national qualifications frameworks in Europe (forthcoming)

¹¹ Certification of learning outcomes is “The process of issuing a certificate, diploma or title of formally attesting that a set of learning outcomes (knowledge, know-how, skills and /or competences) acquired by an individual have been assessed and validated by a competent body against a predefined standard” as defined by Terminology of European education and training policy. Cedefop. 2008.

The study should take into account all the related research and studies carried out by Cedefop on learning outcomes, qualifications standards, curricula and learning programmes, quality assurance systems and certification processes, and qualifications frameworks and credit systems.¹² It should also build on research carried out at national and international level.

The study is embedded in the systematic research work undertaken by Cedefop to analyse current developments towards learning outcomes at national level when defining qualifications, standards, quality assurance, curricula and learning programmes and assessment methodologies and to complement its other comparative studies and analysis on the changing role of qualifications.¹³

2.1.1 The background and the context of the study

Assessment forms an important part of education, training and qualification systems. It has a key role in supporting the learning process. Nature and quality of the learning outcomes, which are assessed, are central to any qualification process leading to the award of a qualification. In VET, assessment methods must capture not only the theoretical knowledge, but also practical skills and key competences and the ability to apply them at work.

Evidence¹⁴ shows that learning outcomes approaches have increasingly been used to reform standards, curricula and learning programmes. As a consequence of this shift, assessment methodologies and practises are expected to change.

According to some authors (e.g. Baartman¹⁵) this brings about the shift from a ‘testing culture’ to an ‘assessment culture’ with the following changes:

- content of assessment (‘what’ is assessed) is changing, focusing more and more not only on knowledge but also on skills and competences;
- assessment and learning are increasingly becoming interconnected;
- the functions of assessment are changing from a focus on summative to a better balance of summative and formative functions;
- assessment is changing from de-contextualised events to relevant learning experiences taking place in an authentic context;
- assessment methods are changing, including not only paper-and-pencil standardised tests, but also e.g. performance assessment and portfolios;
- responsibilities for the assessment process are shared between teacher and learner;
- the notion of what constitutes high quality assessment is changing.

This study focuses on assessment¹⁶ of learners’ competences and knowledge and not on the evaluation of institutions or VET systems.

¹² Cedefop. 2009: The dynamics of qualifications: defining and renewing occupational and educational standards

http://www.cedefop.europa.eu/etv/Information_resources/Bookshop/publication_details.asp?pub_id=556

Cedefop. 2009: The relationship between quality assurance and VET certification in EU Member States

http://www.cedefop.europa.eu/etv/Information_resources/Bookshop/publication_details.asp?pub_id=555

Cedefop. 2009: The shift to learning outcomes: policies and practices in Europe

http://www.cedefop.europa.eu/etv/Upload/Information_resources/Bookshop/525/3054_en.pdf

Cedefop. 2010: Learning outcomes approaches in VET curricula

<http://www.cedefop.europa.eu/EN/publications/16433.aspx>

Cedefop. 2010: Linking credit systems and qualifications frameworks

<http://www.cedefop.europa.eu/EN/publications/15974.aspx>

¹³ Cedefop. 2010: Changing qualifications (forthcoming)

¹⁴ See footnote 12.

¹⁵ Baartman, L. 2008: ‘Assessing the assessment’, pp. 12-13 <http://igitur-archive.library.uu.nl/dissertations/2008-0423-200627/baartman.pdf>

¹⁶ Assessment and evaluation are sometimes used interchangeably.

According to Cedefop (2008: 31)¹⁷ assessment of learning outcomes¹⁸ is defined as “The process of appraising knowledge, know-how, skills and/or competences of an individual against predefined criteria (learning expectations, measurement of learning outcomes). Assessment is typically followed by validation¹⁹ and certification²⁰.”

Assessment fulfils different functions and has different purposes and uses. The distinction is made between assessment carried out for summative and formative purposes.²¹

As defined by Cedefop (2009: 77)²², assessment carried out for summative purposes is “The process of assessing (or valuing) a learner’s achievement of specific knowledge, skills and/or competences at a particular time.” The Eurydice report²³ refers to it as ‘assessment of learning’ and points to the use of the results “to award a certificate or to take important decision”.

Assessment carried out for formative uses²⁴ is “a two way reflective process between a teacher/assessor and learner to promote learning”²⁵. The main purpose of ‘assessment for learning’ is to assist learning process of individuals by identifying specific learning needs and adapt teaching accordingly and to shape improvements in learning and teaching.

The distinction is not always clear-cut. Some authors²⁶ emphasise the need to categorise assessment purposes more precisely as they have important implications for assessment design.

Despite the fact that there is growing importance of the assessment carried out for formative purposes to support learning²⁷, this study aims to explore assessment processes and methodologies used for “summing up or summarising the achievement status of a student and is geared towards reporting at the end of a course especially for purposes of certification”.²⁸

The study should take as a starting point the definition of a qualification as provided in the EQF Recommendation. A qualification is defined as “a formal outcomes of an assessment and validation process, which is obtained when a competent body determines that an individual has achieved learning outcomes to given standard”²⁹. This definition refers to assessment and validation processes which result in recognition and lead to certification. It emphasises the importance of standards against which the assessment is made.

¹⁷ Cedefop 2008: Terminology of European education and training policy

http://www.cedefop.europa.eu/EN/Files/4064_en.pdf

¹⁸ EQF Recommendation (2008) defines learning outcomes as « statements of what a learner knows, understands and is able to do on the completion of learning process”.

¹⁹ Cedefop 2010: Changing qualifications (forthcoming). Validation is defined as “confirmation that the outcomes of assessment of an individual’s learning meet predetermined criteria (standards) and that a valid assessment procedure was followed. This means that the outcomes have been quality assured and can be trusted.”

²⁰ Ibid. Certification: “a record of the individual’s learning has been validated; the certificate usually issued by a body which has public trust and competence, confers official recognition of an individual’s value in the labour market and in further education and training”.

²¹ Eurydice 2009: National Testing of Pupils in Europe: Objectives, Organisation and Use of Results

http://eacea.ec.europa.eu/education/eurydice/documents/thematic_reports/109EN.pdf

²² Cedefop. 2009: European guidelines for validating non-formal and informal learning, p. 77

<http://www.cedefop.europa.eu/EN/publications/5059.aspx>

²³ See footnote 21, p. 8

²⁴ For further information on formative assessment see OECD 2005: Formative Assessment – Improving Learning in Secondary Classrooms

²⁵ See footnote 21, p. 8

²⁶ See for example Newton, P. E. Clarifying the purposes of educational assessment. In *Assessment in Education*. Vol. 14 No. 2, July 2007, pp 149-170

²⁷ Looney, J. Assessment and innovation in education OECD 2009: Working paper No 24, <http://www.oecd.org/dataoecd/41/30/43414899.pdf> or OECD 2005: Formative Assessment – improving learning in secondary classrooms

²⁸ See Sadler, 1989, cited in Newton 2007: Clarifying the purpose of educational assessment, In *Assessment in Education*. Vol. 14. No. 2, July 2007, p. 153.

²⁹ 2008/C 111/01 <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2008:111:0001:0007:EN:PDF>

Cedefop's study on the development of qualifications standards³⁰ defines standards as “norms and specifications regulating the award of qualifications”. Standards take various forms depending on the country. Three types of standards are distinguished:

- assessment standards specify the object of assessment and performance criteria;
- occupational standards that classify and define main jobs that people do: they may specify the professional tasks, functions and associated competences as required by the labour market;
- educational standards “focus on what people need to learn, how they will learn it and how the quality and content of learning will be assessed”; they may define the expected learning outcomes of the learning process leading to a qualification.

According to the above mentioned Cedefop study³¹, in most countries qualifications standards integrate occupational and educational standards, in some countries qualifications are based on educational standards solely and in some countries only on occupational standards. The study also identified a clear trend towards outcomes-oriented standards, defining a set of knowledge, skills and/or competences to be obtained. However, the detailed analysis showed persistent differences in the conceptualisation and design of learning outcomes and competences in these standards.

It is assumed that the way standards (and learning outcomes) are conceptualised and formulated as well as their focus (whether educational or occupational) will influence assessment methods and criteria. For example in the Dutch VET, learning outcomes are defined as competences. They are seen as an integration of knowledge, skills and attitudes. An individual is competent when he/she is able to integrate all three components to successfully meet the complex demands at the workplace. The influence of this definition is that knowledge, skills and attitudes are not assessed separately.³²

Research literature³³ also points out that alignment of standards, curriculum and assessment is critical in standards-based assessment. Looney³⁴ discusses the impact of high-stake summative assessment on innovation in education and training. He concludes that innovative approaches and new assessment methodologies are one of the most effective ways to reconcile educational innovations and high-stakes assessments.

An important goal of the introduction of learning outcomes in VET is to develop the ability of a learner to transfer knowledge, skills and competences acquired in the educational setting to the occupational context. This has important implications for assessment methodologies. Cedefop's study on Learning outcomes approaches in curricula³⁵ identified three tendencies in the recent assessment reforms in the nine countries under examination:

- making assessment methods valid for judging the ability of learners to be competent in a work situation;
- to organise assessment in a progressive and more flexible way;
- increased importance of assessment for formative purposes.

³⁰ Cedefop. 2009: The dynamics of qualifications: defining and renewing occupational and educational standards http://www.cedefop.europa.eu/etv/Information_resources/Bookshop/publication_details.asp?pub_id=556

³¹ Ibid, p.7

³² Cedefop. 2010: Learning outcomes approaches in VET curricula, p.121 <http://www.cedefop.europa.eu/EN/publications/16433.aspx>

³³ Looney, J. Assessment and innovation in education. OECD 2009: Working paper No 24 <http://www.oecd.org/dataoecd/41/30/43414899.pdf> or

Daugherty, R., Black, P., Ecclestone, K., James, M. and Newton, P. 2008: Alternative perspectives on learning outcomes: challenges for assessment, in Curriculum Journal, 19: 4, 243 — 254 or

Cedefop. 2010: Learning outcomes approaches in VET curricula <http://www.cedefop.europa.eu/EN/publications/16433.aspx>

³⁴ See footnote 33

³⁵ Cedefop 2010: Learning outcomes approaches in VET curricula, p.122- 123. <http://www.cedefop.europa.eu/EN/publications/16433.aspx>

As already indicated above, quality of assessment processes and methods is crucial for generating mutual trust in qualifications.³⁶ Validity³⁷ and reliability³⁸ are at the heart when referring to quality of assessment. Bartman³⁹ explores how these concepts are used in the competence-based assessment and whether there are complementary criteria needed when applying new assessment methods.⁴⁰

Against this background the study should map and analyse assessment methodologies used for summative purposes in initial vocational education and training and explore the implications of learning outcomes approaches on the design of assessment methodologies (including conceptualisation of assessed learning outcomes and the use of standards, assessment methods, quality criteria etc).

2.2 General purpose of the study contract

The study shall provide a comparative overview and analysis of assessment methodologies used for summative purposes in 32 European countries participating in Education and training 2020 (“ET2020”). The focus is **on initial vocational education and training in two economic sectors: electronics and tourism**.

Explorative and empirical approach should be taken to establish a solid empirical base for comparative analysis of assessment methodologies in the two above mentioned economic sectors.

In addition, the study should analyse **10 cases studies** (5 for each sector) from at least 5 countries focusing on assessment practises in selected qualifications in electronics and tourism sectors based on desk research and primary data collection. Different stakeholders should be interviewed (employers, assessors, learners, awarding bodies etc.).

The outcomes of the study will inform the EU and national policy debate on the need to modernise assessment methodologies and will support the implementation of the European Qualifications Framework and corresponding national qualifications frameworks.

2.3. Main research issues

The key research questions to be analysed in the framework of the study contract are:

- How and up to what extent the current emphasis on learning outcome-oriented approaches have influenced assessment methodologies in initial vocational education and training in 32 countries under examination? What are the rationales behind these reforms?
- What are the implications of learning outcome-oriented approaches to the design of assessment methodologies (including conceptualisation of assessed learning outcomes and use of standards, assessment methods, quality criteria etc.)?

³⁶ Cedefop 2009: The relationship between quality assurance and VET certification in EU Member States has identified several methods to assure quality of assessment, e.g. centrally defined assessment criteria/methods/precise specifications, use for external examination centres or examiners, use of assessment committees or multiple assessors and systematic training of assessors.
<http://www.cedefop.europa.eu/EN/publications/5055.aspx>

³⁷ This criterion tries to indicate “the extent to which that which is evaluated is at the same time the feature that one really wants to know about.” See Heidegger, Evaluation research, p. 829. In Handbook of Technical and Vocational Education and Training Research. 2008. Springer Science+Business Media B.V.

³⁸ Many definitions are used. See Cedefop 2009: The relationship between quality assurance and VET certification in EU Member States, p. 19 “Reliability is understood to concern the consistency of the certification process, both over time and across assessors and awarding bodies”.

http://www.cedefop.europa.eu/etv/Information_resources/Bookshop/publication_details.asp?pub_id=555 or Baartman, L. 2008. ‘Assessing the assessment’, p. 32. “The reliability is concerned with the degree to which the same results would be obtained on a different occasion, in a different context or by a different assessor”.

³⁹ Baartman, L. 2008. ‘Assessing the assessment’, pp.32 -36

⁴⁰ Ibid, p. 35 Ten quality criteria for competence-based assessment are proposed: authenticity, cognitive complexity, fairness, meaningfulness, directness, transparency, educational consequences, reproducibility of decisions, comparability and cost-efficiency.

- What are the main similarities and differences between countries and examined sectors?
- How are the current assessment methodologies applied in practice?
 - What methods/mechanisms exist/are used to assess learning outcomes?
 - What are the strengths and weaknesses of these methods?
 - Which quality criteria are applied?
- What are the implications of applied assessment methodologies to individuals and the labour market (including relevance of assessed learning outcomes to the labour market's needs, facilitating individuals in further learning etc)?

2.4 Description of the tasks and methodology

2.4.1 Tasks

1. Review research literature on the implications of learning outcomes-oriented approaches on assessment methodologies (including conceptualisation of assessed learning outcomes and the use of standards, assessment methods, quality criteria etc) and develop the analytical framework for comparative analysis.
2. Review and analyse comparatively the current situation as regards assessment methodologies (including conceptualisation of assessed learning outcomes and the use of standards, assessment methods, quality criteria etc) in two sectors: **electronics and tourism** in **32 countries** participating in Education and training 2020 ("ET2020"). Develop an empirical basis through primary and secondary data collection;
3. In-depth analysis of **10 case studies** of assessment practices (including detailed analysis of the assessed learning outcomes, assessment tasks and assignments, assessment methods and interviewing key stakeholders (employers, learners, assessors, awarding bodies);
4. Identify key common issues and challenges related to the design and use of assessment methodologies in member states or clusters of member states. Formulate conclusions and key messages which will inform European and national policy-making. Propose issues for further research.

Throughout the completion of these tasks, the contractor will consult closely with Cedefop's staff in charge of the project.

2.4.2 Methodology

The study should follow a comparative and qualitative approach. It should take into account existing research as well as develop primary data collection.

➤ Desk research

The research team will review the most recent relevant scientific/research publications at national and international level and identify relevant secondary data in the 32 countries, including qualitative analyses of recent policy decision (and reports). National experts should be contacted to gather the most up-to-date developments. The literature review will be complemented with interviews and meeting with national experts if necessary. Criteria for selecting the qualifications to be analysed within initial VET in the two pre-defined sectors - electronics sector and tourism sector - should be defined at the very beginning of the study. An important criterion for selecting qualifications within these two economic sectors should be the degree of comparability between different countries⁴¹. The final decision on the qualifications to be examined will be taken in the inception phase of the study together with Cedefop project manager(s) in charge.

⁴¹ Existing literature on comparability of occupational profiles and VET programmes to be consulted. See for example VET-LSA: A comparative analysis of occupational profiles and VET programmes in 8 European countries. International report. Vocational Training Research. Volume 8.
http://www.bmbf.de/pub/band_acht_berufsbildungsforschung_eng.pdf

Research tools

The contractor will develop research tools for the collection and analysis of primary and secondary data in particular, for mapping and analysing assessment methodologies in 32 countries and analytical framework and tools for systematic description of case studies.

➤ Analysis of case studies

The analysis of the case studies will be based on literature reviews as well as on qualitative research methods (i.e. through country visits, interviews with stakeholders to be identified by the contractor, and any other means proposed by the contractor to collect primary and in-depth information on assessment practises and methodologies (including detailed analysis of assessment tasks and assignments, assessment methods and interviewing key stakeholders (employers, learners, assessors, awarding bodies). The criteria for selecting these examples will be identified in the initial research stage. The 10 case studies should cover minimum 5 countries in two sectors: electronics sector and tourism (5 case studies in each sector).

➤ Establishing a network with national experts

The contractor is advised to build a team of experts across different countries to carry out the analysis and validate the findings and key policy recommendations.

2.5 Deliverables and timetable (outcome)

The contractor is required to submit:

An inception report, six weeks after the date of signature of the contract and following the kick-off meeting with Cedefop representatives, which refines the methodology proposed in the tender, including a draft proposal of research tools (e.g. draft questionnaires/interviews grids, tools for the analysis of secondary data, a detailed list of key stakeholders...).

A draft interim report, within ten months of the date of signature of the contract, which will include:

- results of the research literature review;
- a preliminary overview of assessment methodologies;
- indication of the examples of case studies that have been selected for in-depth analysis;
- a short description of the methodology, including the final version of the tools for data collection and analysis;
- a list of data sources, including bibliographical data, reference people and institutions;
- an updated work plan and timetable;
- information on any major challenges encountered, solutions found or proposed and potential impact on the preparation of the final version of the study.

A draft final report within 14 months of the date of signature of the contract and a final report of within 16 month of the date of signature, following the guidelines provided in these Technical Specifications and including:

- an introduction;
- an executive summary, highlighting the main findings and key policy considerations for the future;
- a comparative analysis of the research literature overview and analytical framework of the study;
- a descriptive comparative overview of assessment methodologies in 32 countries over the last years illustrated with national examples;

- a comparative analysis (32 countries) of approaches, identifying trends and actions, gaps and challenges across the countries under consideration, illustrated with examples of practice, which should be embedded in the text;
- an in-depth analysis of 10 case studies including detailed analysis of assessment tasks and interviewing key stakeholders as described in task 3 in point 2.4;
- conclusions with policy options to inform European and national policy making;
- annexes, such as a bibliography, list of abbreviations, research tools, and a full description of the methodology.

Cedefop will provide comments on all reports received by the contractor. The Contractor will take these comments into account in the preparation of the final version of the study (final report). The Contractor will submit the deliverables in English, in electronic format (Word). Any tables, figures, graphs created should also be made available as separate files and include the data used in order to reproduce the figures. The layout and format of the text – in particular rules for citation, bibliography, tables and figures – should comply with Cedefop's style manual (see Annex I of the Tendering Specifications).

The contractor should ensure professional editing of the final report and include it in the financial offer.

2.6 Meeting and Travel expenses

The contractor will be requested to attend the following meetings:

- **three one-day** meetings at Cedefop with the project managers responsible:
 - a kick-off meeting a few weeks after the signature of the contract to fine-tune the research methodology to be applied, the data sources to be used and the final planning, described in the inception report;
 - a meeting to discuss the draft interim report, monitor progress and discuss the interim findings and preliminary key messages of the study;
 - a meeting to discuss the final outcomes and key policy messages included in the draft final report, and agree the final version of the study;
- **A one day** expert workshop probably in January 2012 in Thessaloniki (the date is subject of change).

2.7 Reimbursement of travel expenses

All costs incurred (travel, accommodation, etc) related to Cedefop's meetings (point 2.6 above) have to be included in the financial offer, point c) of Table 1.

Any other travel, accommodation etc. expenses that may occur in performing the tasks as described in points 2.3 and 2.4, have also to be included in the financial offer, point b) – sub total (2) of Table 1.

Any extra travel, accommodation etc expenses besides those mentioned above, that might be needed to perform the tasks related to the contract, shall be subject to Cedefop's prior approval and shall be reimbursed by Cedefop separately, according to its relevant rules (see Annex III of the draft contract in Annex B).

3 Specific information concerning participation to this tender

Tenderers must meet the exclusion and selection criteria and have the legal position to allow them to participate in this tendering procedure.

In case any document(s) concerning exclusion (point 3.1) and selection criteria (point 3.2) is/are missing, the tender will automatically be rejected. Cedefop reserves the right to ask for additional clarification, if needed, only on documents presented within the tender. Missing documents will not at all be requested. Before sending, please therefore make sure that all requested documents are included.

3.1 Exclusion criteria

Participation to this tender is only open to tenderers who are in a position to subscribe in full to the declaration on exclusion criteria and absence of conflict of interest in Annex C. Therefore all tenderers, all consortium members (if any) and all subcontractors specified as per point 4.2, 2nd sub-paragraph (if any) shall provide the self-declaration found in Annex C duly signed and dated.

In case of recommendation for contract award the tenderer shall be requested to provide the documentation indicated in point (I) of Annex C.

Cedefop reserves the right to check the situations described in points c) and f) of the declaration.

3.2 Selection criteria

The tenderers must submit evidence of their economic, financial, technical and professional capacity to perform the contract.

An economic operator may rely on the capacities of other entities, regardless of the legal nature of the links which it has with them. It must in that case prove to the contracting authority that it will have at its disposal the resources necessary for performance of the contract, for example by producing an undertaking on the part of those entities to place those resources at its disposal.

3.2.1 Economic & Financial capacity

Requirement

- Tenderers must be in a stable financial position and have the economic and financial capacity to perform the contract.

Proof of economic and financial capacity must in particular be furnished by the following documents:

- **a statement of tenderer's total turnover for the last three years related to services similar in nature to those making the subject of this call;**

and

- **the Profit and Loss Account or equivalent for each of the last three years.**

In case of contract award the winning tenderer will be requested to prove the above by Audited Financial Statements if this is foreseen by the national legislation.

In case of consortium (grouping) or subcontracting each member of the consortium and all subcontractors (in line with point 4.1 or 4.2 below) must provide the required evidence for the economic and financial capacity.

In case tenderers are unable to furnish such documents they are required to provide justification for non provision.

3.2.2 Technical and professional capacity

Tenderers must demonstrate qualifications, knowledge, skills and the ability to perform the tasks outlined in the technical specifications. In particular, the tenderer must comply with the following requirements:

- The tenderer must have three (3) years experience in the field of comparative analysis in education and training at European level and demonstrate capacity to access data at national and European levels;
- For the research team:
 - The team leader:
 - ✓ five (5) years of professional experience in research project management;
 - ✓ three (3) years of experience in comparative analysis in education and training at European level;
 - ✓ linguistic ability to communicate and draft in English
 - The members of the research team:
 - ✓ three (3) years of individual experience in one of the following two fields of comparative research:
 - qualifications development with focus on research of assessment **or** vocational education and training systems

However, the proposed set of CVs must cover both fields.

- In addition all members of the proposed research team must possess the linguistic ability to communicate and draft in English and as a whole the team must demonstrate capability to communicate and draft to a **high** standard in English corresponding to level C1⁴² as determined in “Language levels of the Common European Framework of Reference (CEF)”.

The following documents or information must be presented as evidence of compliance with the above criteria:

- a tenderer’s profile showing the professional capacity of the tenderer especially as regards to comparative analysis in education and training and a description of measures employed to ensure access to the required data;
- a list of major contracts/studies in the field of comparative analysis in education and training performed over the past three (3) years including sums, dates and commissioning authorities, public or private, and specifying the subject of the contract studies.
- detailed CVs of the team leader and all members of the research team with a brief description of professional experience in particular in relationship to the above required criteria, indicating language qualifications and including a list of individual’s research outputs/publications related to comparative studies in education and training (Cedefop encourages the use of Europass CVs⁴³ but other CVs will also be accepted).

In the case of consortium or subcontracting, the consortium or the tenderer with all subcontractors together have to provide evidence of technical and professional capacity as a whole (please see also 4.1 and/or 4.2 bellow).

⁴² <http://europass.cedefop.europa.eu/LanguageSelfAssessmentGrid/en>

⁴³ <http://europass.cedefop.europa.eu/europass/home/vernav/Europass+Documents/Europass+CV.csp>

3.3 Legal Position

Tenderers may choose between submitting a joint offer (see 4.1) as a Consortium / Grouping or introducing a bid as a single tenderer, in both cases with the possibility of having one or several subcontractors (see 4.2). Whichever type of bid is chosen, the tender must stipulate the legal status and role of each legal entity in the tender proposed. To identify himself the tenderer must complete a Legal Entity Form found in Annex D which must be accompanied by all documents and information indicated in the form.

The Legal Entity Form should be completed and signed by the representative(s) of the tenderer (*who also sign(s) the cover letter as per point 4 of this invitation*) authorised to sign contracts with third parties.

The Legal Entity Form should not be submitted by sub-contractors (if any).

4 Additional information concerning participation to this tender

Participation in tendering procedures is open on equal terms to all natural and legal persons or groupings of such persons (consortia) falling within the scope of the Treaties. It includes all economic operators registered in the EU and all EU citizens. Pursuant to Article 106 of the Financial Regulation the participation is also open to all natural and legal persons in any non-EU country which has an agreement with the Union in the field of public procurement on the conditions laid down in that agreement.

A natural or legal person can take part (as an individual tenderer or as member of a consortium submitting a tender) in only one tender. In the opposite case all tenders in which that person has participated may be excluded from the evaluation.

4.1 Joint Offers/ Groupings (Consortia)

Groupings (consortia), irrespective of their legal form, may submit a tender on condition that it complies with the rules of competition. A consortium may be a legally-established permanent grouping, or informally constituted group of tenderers submitting an offer (joint offer) for a specific tender procedure.

Cedefop does not require consortia (if any) to have a given legal form in order to submit a tender, but reserves the right to require a consortium to adopt a given legal form before the framework contract is signed (if this change is necessary for proper performance of the contract). This can take the form of an entity with or without legal personality but offering sufficient protection of the contractual interests of Cedefop.

If awarded the contract, the tenderers of the group (consortium) will have an equal standing towards Cedefop in executing it.

Grouping (if any) of firms must nominate one party to be responsible for the receipt and processing of payments for members of the grouping, for managing the service administration, and for coordination.

Tenders submitted by consortia of firms must specify the role, qualifications and experience of each member of the group.

Each member of the group (consortium) must provide the required evidence for the exclusion and selection criteria. Concerning the selection criteria, the evidence provided by each member of the group (consortium) will be checked to ensure that the consortium as a whole fulfils the criteria.

The offer has to be signed by all members of the group (consortium). However, if the members of the group so desire they may grant an authorisation to one of the members of the grouping (consortium). In this case they should attach to the offer a power of attorney (see model in Annex G) authorising this company or person to submit a tender on behalf of the grouping (consortium). For groupings not having formed a common legal entity, Annex G, model 1 should be used and separate legal entity forms (see point 3.3 and Annex D) should be completed and signed by all members. For groupings with a legal entity in place, Annex G, model 2 and one legal entity form (see point 3.3 and Annex D) should be completed and signed only by the single representative of the consortium.

The contract will have to be signed by all members of the group (consortium). If the members of the group (consortium) so desire, they may grant authorisation to one of the members of the grouping by signing a power of attorney. The same model as above duly signed and returned together with the offer (Annex G) is valid also for signature of the contract.

Partners in a joint offer assume joint and several liability towards Cedefop for the performance of the contract as a whole.

4.2 Subcontracting/Subcontractors

Subcontracting is defined as the situation where a contract has been or is to be established between Cedefop and a contractor and where the contractor, in order to carry out that contract, enters into legal commitments with other entities for performing part of the service. If awarded, the contract will be signed by the selected Tenderer (the Contractor), who will be vis-à-vis Cedefop the only contracting party responsible for the performance of this contract. Cedefop has no direct legal commitment with the subcontractor(s).

The contractor retains full liability towards Cedefop for performance of the contract as a whole. Cedefop will treat all contractual matters (e.g. payments) with the contractor, whether or not some tasks are performed by a subcontractor. Under no circumstances can the contractor avoid liability towards Cedefop on the grounds that the subcontractor is at fault.

Any subcontracting/subcontractor must be approved by Cedefop, either by accepting the bidder's tender, or, if proposed by the Contractor after contract signature, in writing by an exchange of letters. In the latter case subcontracting/subcontractor will be accepted only if it is judged necessary and does not lead to distortion of competition.

The tenderer must clearly indicate in his offer which parts of the work and what percentage (of the work by value) will be sub-contracted (if any). The tenderers should submit duly filled-in and signed the Form in Annex H (Model of Letter of Intent for Subcontractor/s).

If the subcontractors cannot already be clearly identified by the Tenderer, then he should at least clearly identify a list of potential subcontractors in the bid. Additionally the tenderer should specify:

- the identity of those subcontractors only undertaking between 10% and 40% of the work by value,
- the identity of all subcontractors if the total sub-contracting is above 40% of the work by value. In this case each and every sub-contractor, independently of his contribution to the work by value, must be identified.

For each subcontractor, identified as per the above two bullets, the tenderer must:

- provide a document stating clearly the identity, roles, activities and responsibilities of subcontractor(s);
- provide a Letter of Intent signed by the subcontractor stating his unambiguous undertaking to collaborate with the tenderer if the latter wins the contract and the extent of the resources that he will put at the tenderer /contractor's disposal for the performance of the contract;
- provide the required evidence for the capacity of the subcontractor(s) in regards to the exclusion and selection criteria.

N.B. The subcontractor(s) (if any) have to provide the documents to prove their capacity only for the parts of the contract that are relevant to them. The evidence provided will be checked to ensure that the tenderer with the sub-contractor(s) altogether fulfil the criteria.

Where no sub-contractor is given (meaning that possible individual sub-contracting is below 10% by value), the work will be assumed to be carried out directly by the tenderer (single tenderer or group of tenderers (consortium)).

5 Award of the contract

Only the tenders meeting the requirements of the exclusion and selection criteria will be evaluated in terms of quality and price.

The contract shall be awarded to the tenderer submitting the tender that offers the best-value-for-money (best quality-price ratio).

A quality-price ratio will be calculated for each tender by dividing the total points for quality by the price, thus indicating which tender represents the best value for money.

5.1 Technical evaluation

The following technical award criteria will be applied to this tendering procedure:

- **Award criterion 1- The level of understanding of the nature of the assignments, its context and results to be achieved (30 points)**
 - Demonstration of an in-depth knowledge and understanding of the concepts and research issues at stake **(15 points)**
 - Relevance of the proposal to the objective of the study, its context and results to be achieved **(15 points)**
- **Award criterion 2 – The quality and relevance of the methodological approach to carry out the work (40 points)**
 - Relevance and soundness of the methodological approach proposed to carry out the tasks (envisaged steps, research methods and tools, data sources to be used **(30 points)**)
 - Criteria for identifying and selecting the 10 case studies to be analysed in accordance with the requirements outlined in these Technical Specifications **(10 points)**
- **Award criterion 3 – Appropriateness of organisation and management of the work (30 points)**
 - Allocation of human resources in relation to the type of activities to be carried out **(15 point)**
 - Project organisation and mechanisms to guarantee successful and on-time delivery of tasks with adequate quality and risk management (clarity, coherence and feasibility of the work programme and timetables **(15 points)**).

Tenders scoring less than **65 (of a maximum of 100) points** against the technical criteria, will not be considered acceptable and will therefore not have their financial proposal evaluated.

5.2 Technical proposal

The assessment of the technical quality will be based on the ability of the tenderer to meet the purpose of the contract as described in the technical specifications. To this end, the tenderer must provide the following documents and/or information to allow evaluation of their offer according to the technical criteria mentioned above:

For award criterion 1

- a detailed description of the rationale and conceptual approach underlying the completion of the study, including:
 - a brief discussion paper demonstrating in-depth understanding of the subject and the purpose of the study, with detailed research issues, questions and hypotheses underlying the study.

For award criterion 2

- a detailed description of the envisaged methodology of the study, including:
 - a description of the methodological approach, steps, tools and criteria for the collection and analysis of data with a list of potential data sources to be used (such as surveys, qualitative research) and key reference institutions and experts (national consortia, etc.).
 - criteria for the identification, selection and analysis of 10 case studies within the two pre-defined sectors;

For award criterion 3

- a detailed description of the development stages, including:
 - a list of team members together with an explanation of the nature and extent of their participation in the work;
 - a detailed work plan illustrating intended organisation and management of the work, including a timetable, with key milestones and deliverables (please refer to 2.3 and 2.4) and with a detailed preliminary assessment of likely difficulties in carrying out the work and proposed actions.

5.3 Financial evaluation

Only tenders scoring **65 points or more (of a maximum of 100)** points against the technical award criteria will have their financial proposal evaluated. The evaluation will be made on the basis of the **total price** (a+b+c) offered in table 1 – Price schedule table (see point 5.4).

5.4 Financial proposal

The financial proposal should indicate the total price in order to carry out all the activities indicated in the technical specifications. The tenderers must fill in the following table 1 - price schedule table and present a detailed breakdown of the price offered.

Table 1: Price schedule table (all fields are mandatory)

	Services	Price
a)	Price to carry out all the activities described in the technical proposal, including proof-reading/editing in English of the final report (see point 2.4 – last paragraph)	(I) Number of person-days: (II) Price per person-day: Sub Total (1) = (I) x (II);
b)	All estimated travel, accommodation, etc. expenses related to performance of the tasks (indication of total amount – see point 2.7 – 2 nd paragraph)	Sub Total (2) =
c)	Attending 4 meetings at Cedefop premises (indication of total amount for all 4 meetings – see point 2.6 and 2.7 – 1 st paragraph)	Sub Total (3) =
	Total price: sum of sub totals (1+2+3):	

Information concerning price

- The prices quoted must be fixed and not revisable.
- Prices must be quoted in euro and include all expenses.
- Any extra travel expenses, that might be needed to perform the tasks related to the contract, shall be subject to Cedefop's prior approval and shall be reimbursed by Cedefop separately, according to its relevant rules (see Annex III of the draft contract in Annex B).
- Under article 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities, Cedefop is exempt from all charges, taxes and dues, including value added tax (VAT). Such charges may not therefore be included in the calculation of the price quoted. The VAT amount must be indicated separately see point 5.4.

6 Information on presentation and content of tender

It is extremely important that tenderers present their tender in the correct format and provide all documents necessary to enable the evaluation committee to assess their tender. Tenderers should fully respect the instructions indicated under points 2 and 3 of this open invitation to tender.

In addition, below you will find details of the required documentation.

6.1 Envelope A - Supporting documents

One original and one copy of:

- a cover letter duly signed from the individual(s) entitled to sign the contract in case of contract award, as requested in point 4 of the invitation to tender;
- the exclusion criteria declaration as requested in point 3.1 and standard template found in Annex C
- the selection criteria documents as requested in point 3.2
- the legal entity form as requested in point 3.3 and found in Annex D
- the financial identification form as found in Annex E completed by the single tenderer or by the party nominated as representative for the payments in case of groupings (subcontractors don't need to submit this form)
- all relevant documentation concerning joint offers-groupings and subcontracting, if any, as requested in points 4.1, 4.2 and found in Annexes G and H
- the checklist found in Annex F

6.2 Envelope B – Technical proposal

One original signed unbound version and three bound copies of:

- the technical proposal providing all information requested in point 5.2.

6.3 Envelope C – Financial proposal

One original signed unbound version and three bound copies of:

- the financial proposal containing all information requested in point 5.4

ANNEX A

CONTRACT NOTICE

(Given as separate file in *.pdf)

ANNEX B

DRAFT CONTRACT

(Given as separate file in *.pdf)

ANNEX C

DECLARATION ON EXCLUSION CRITERIA

(Given as separate file in *.doc)

ANNEX D

LEGAL ENTITY FORM

(to be downloaded, depending on the nationality and legal status of the tenderer, from the following website)

http://ec.europa.eu/budget/execution/legal_entities_en.htm

ANNEX E

FINANCIAL IDENTIFICATION FORM

(to be downloaded, depending on the nationality of the tenderer, from the following website)

http://ec.europa.eu/comm/budget/execution/ftiers_en.htm

PLEASE NOTE :

Please indicate the BIC (Bank Identification Code) in the REMARKS box of the downloaded form.

ANNEX F

CHECK LIST OF MANDATORY DOCUMENTS

The checklist must be used to ensure that you have provided all the documentation for this tender and in the correct way. This checklist should be included as part of your offer.

Please Tick ✓ the boxes provided

<u>Mandatory</u> documents to be included as part of the tender	Reference paragraph	Included		If the document is not included, please provide an explanation for the reason
<u>Envelope 'A' must contain</u> one original and one copy of:		Yes	No	
- this checklist	Annex F & point 4 of page 2	☐	☐	
- exclusion criteria declaration (If applicable, including those of consortia and subcontractors)	Annex C, 3.1, 4.1 & 4.2	☐	☐	
- selection criteria documents (If applicable, including those of consortia and subcontractors)	3.2, 4.1 & 4.2	☐	☐	
- legal entity form	Annex D & 3.3	☐	☐	
- financial identification form	Annex E & 6.1	☐	☐	
<u>Envelope 'B' must contain</u> one original and three copies of:				
- the technical proposal	5.2, 6.2	☐	☐	
<u>Envelope 'C' must contain</u> one original and three copies of:				
- the financial proposal	5.4, 6.3	☐	☐	

You should also ensure that:

☐	your offer is formulated in one of the official languages of the European Union.
☐	both the technical and financial proposals of the offer are signed by you or your duly authorised agent.
☐	your offer is perfectly legible in order to rule out any ambiguity.
☐	your offer is submitted in accordance with the envelope system as detailed in the invitation to tender point 3.
☐	the outer envelope bears the information mentioned in the invitation to tender point 3.

ANNEX G

MODEL 1 & 2- POWER OF ATTORNEY

(Given as separate files in *.doc)

ANNEX H

MODEL OF LETTER OF INTENT FOR SUBCONTRACTOR/S

(Given as separate file in *.doc)

ANNEX I

CEDEFOPs STYLE MANUAL

(Given as separate file in *.pdf)